

bpmonline

bpm'online release

7.13.0

09/26/2018



Simplify the future

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We at bpm'online are constantly working to deliver advanced capabilities to accelerate your sales, service, and marketing processes. Here are the **new features** included in bpm'online version 7.13.0.

The update guide is available for **download** in a separate article [here](#).

Discover all of the **upcoming features** and improvements to our product range on the [upcoming releases page](#). Here are the new features included in bpm'online version 7.13.0:

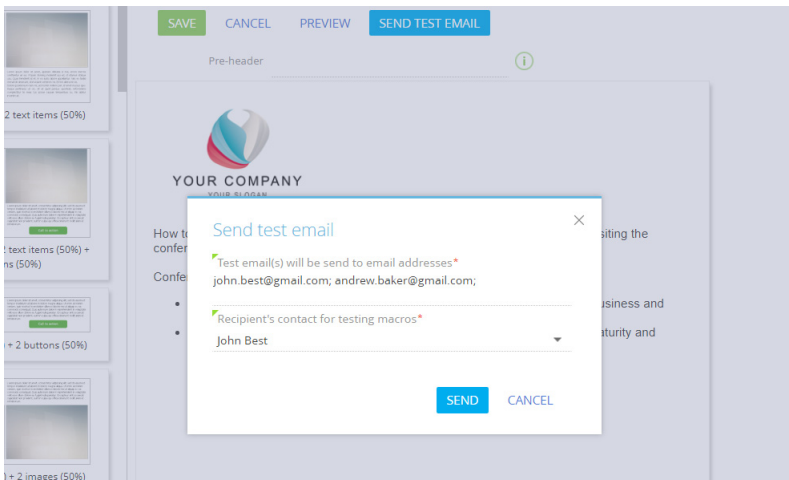
BPM'ONLINE MARKETING



BULK EMAILS

- The maximum size of a bulk email template has been increased to 5 Mb.
- You can now send test messages directly from the content designer page. The [Send test email] button opens a window where you can:
 - Enter email addresses for receiving test emails, separated with blank spaces, commas or semicolons.
 - Select the recipient's contact for testing of personalization macros. Previously, the contact for testing the macros was specified in the system settings.

Sending test emails from the content designer



CONTENT DESIGNER

- In the content designer, you can now edit:
 - borders, border color, width and style;
 - background color;
 - indent spaces at the content block borders.

BPM'ONLINE SERVICE






- We have improved calculation of case resolution delay in the [Actual response time] field. Bpm'online will not be taking non-working hours into account when calculating the resolution delays. Non-working hours are determined according to the current calendar.
- Bpm'online now properly re-calculates the resolution time upon re-opening a case. Reopened cases will no longer be flagged as overdue according to their original deadlines.

CUSTOMER PORTAL

- Email threads are now displayed automatically on the portal, without the need to verify each message individually by a helpdesk agent. In the case history, bpm'online displays cases and messages, whose "From", "To" or "CC" fields contain the email of the case contact.
- The self-service portal feature is now a part of bpm'online studio. By default, the portal in bpm'online studio only includes the [Knowledge base] section. You can add custom sections from the primary application to the customer portal.

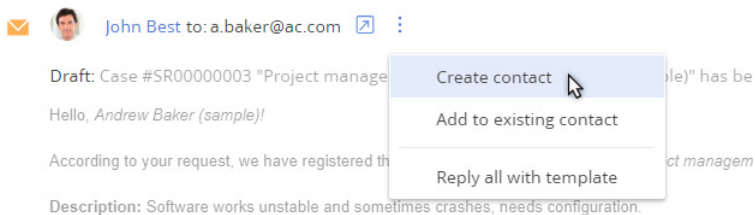
CASE HISTORY

- Straight text without spaces, such as links, is now properly hyphenated in the case history. Also, the  button (create new case based on selected text) will always be displayed in the visible area of the screen.
- We have added a new  menu for processing emails in the case history. With this menu, you can:
 - reply all recipients using an email template;
 - create a contact based on email;
 - link email to an existing contact;
 - enrich the contact (the  button is displayed in this case).

You can add custom actions to this menu as well.

Email message menu in the case history

September 2016







- If an email has many recipients, you can view them by hovering the cursor over one of the addresses.

Viewing the list of email recipients

[←](#) **PROCESSING** [CLOSURE AND FEEDBACK](#) [CASE INFORMATION](#) [TIMELINE](#) [ATTACH](#)

Show system messages

September 2016



John Best to: a.baker@ac.com



Draft: Case #SR00000003 "Project management software configuration (sample)" has been reg

Hello, *Andrew!*

According to your request, we have registered the Service request #SR00000003 "Project management sof

Description: Software works unstable and sometimes crashes, needs configuration.

Created on: 9/18/2016 8:17:26 PM;

Scheduled resolution time: 9/20/2016 8:17:26 PM.



- We have also optimized how email threads are displayed in the history. Now, if you edit an email draft several times before sending, the history will store only the most recent version of the email.

CORE FUNCTIONS

- You can now hide column captions when setting up tiled lists. The corresponding checkbox has been added to the list column settings.




Hiding column captions in a tiled list

Accounts   **bpm'online** 7.13.0.115 [VIEW](#)

[NEW ACCOUNT](#) [ACTIONS](#)

[Filters/folders](#) [Tag](#)

Alfabusiness Primary contact John Oldman	Primary phone (657) 932-7523	Type Customer Category A	
Beetwix Primary contact Stanley Brooks	Primary phone (657) 767-7036	Type Customer Category D	
 Akkom Primary contact Andrew Baker	Primary phone (657) 764-3322 Web akkom.com	Type Customer Category B	Country United States City Boston
Camelia Primary contact	Primary phone (657) 767-7036	Type Customer Category	

- You can now quickly search and add recipients when sending email messages from the communication panel. Start typing the recipient or company name, and bpm'online will

suggest recipients based on the entered text. This functionality requires enabling the global search feature.

- We have increased the speed of importing data from Excel while reducing resource consumption for MS SQL-based bpm'online applications.
- Export to Excel will no longer ignore data in the unsupported format (e.g., dates in the invalid format).

HOT KEYS

- You can now save changes on record pages using the "hot keys", such as CTRL+ENTER and CTRL+S.
- Pressing ENTER now confirms choices made in a dialog window.

GLOBAL SEARCH

- The global search services have been updated to version 1.4. In the new version, we have implemented the PostgreSQL support and improved operation in the fault-tolerant mode for instant data indexing service. Added, modified or deleted records are now available for search without indexing. The updates have been implemented for the cloud applications, starting from bpm'online version 7.12.2 and higher. To update on-site applications, use the [global search setup guide](#).
- If a user does not have permissions for a specific object column, e.g., for viewing an invoice amount, such column is not displayed on the page of global search results.
- The relevance of filtered global search results has been increased. For example, if you set up a filter by contact on the search result page, contacts with matching names will be displayed at the top of the list.

PREDICTIVE ANALYSIS

- You can now monitor the training stages of machine learning models.

Indicator of model training process

Name*

Case priority prediction

Type*

Lookup prediction

Object*

Case

Not started

Prediction enabled

- The new instances will be activated automatically, when the training is complete.
- Machine learning models can now be automatically retrained to keep them up-to-date.

- You can now add columns from the connected objects to the training selection.


Adding a column from a connected object to the selection of a machine learning model

Case priority prediction

FAULT TOLERANCE

- Redis session storage server can now work in the Redis Sentinel fault-tolerant mode. If the primary storage server goes down, the application automatically switches to a reserve server while the users continue working in the application.

MOBILE APPLICATION

- We have enabled a full screen view for charts in the [Dashboards] section of a mobile app. To switch a dashboard tile to the full-screen mode, tap the  button in the top right corner of the application window.
- When you switch a chart to the full-screen mode, the list of records used in the chart appears below the diagram.
 - Column setup and sorting in the list are performed according to settings in the primary application.
 - You can switch to any list record if it is available in the mobile app.
 - Tap a diagram area to filter the data in the list.



A chart in full-screen mode on the mobile app



- Data caching has been implemented in the [Activities] section of the mobile app. It enables working with schedules even when Internet connection is unavailable. As soon as the connection is restored, the application will continue regular operation in the online mode.

INTEGRATIONS

- We have improved MS Exchange calendar synchronization with bpm'online. This has significantly decreased the website load when simultaneously synchronizing calendars for 100 and more users.



BUSINESS PROCESSES

- Process log now traces the [Start timer] element, intermediate signals and the end event.
- We have accelerated execution of process elements with many parameters as well as execution of cyclic business processes.
- Business process performance for applications that operate in the web farm mode has been improved. Due to lower numbers of Redis queries, the server workload has decreased and the transfer to a new step of a business process has become faster as a result.
- Support of the [Event-based gateway] element has been added for the interpreted sub-processes. Now, you do not need to perform compilation when setting up a business process with the [Event-based gateway] element.



WEB SERVICES

- When setting up authentication via the OAuth 2.0 protocol, you can specify how the "Client Id" and "Client secret" will be passed to the authentication server. This increases the compatibility with third-party systems that use OAuth.

USER CUSTOMIZATION TOOLS



- The “Gauge” dashboard tile now displays large numbers with separators in accordance with the user culture.
- In the section wizard, you can now set up business rules for a section with several pages, which are located in parallel packages and one of these packages is selected as current.

DEVELOPMENT TOOLS



- The compilation of configuration build (Assembly) is now performed in the file system and not in the database. During the compilation, five backup copies of the configuration build are created, which enables reverting to any of them if needed. Application compilation and runtime have been accelerated as a result.
- PostgreSQL DBMS support (latest official version) has been implemented for bpm’online studio. This DBMS is open, supports operation on free OS (e.g., Linux) and is highly reliable. In the upcoming releases, we plan to implement support of PostgreSQL DBMS for all products of bpm’online CRM-bundle.
- You can now work with bpm’online applications in the debug mode. Change the “Debug mode” system setting or execute the following code in the browser console:

```
Terrasoft.SysSettings.postPersonalSysSettingsValue("IsDebug",
[true\false]).
```

Update the page after applying the changes.

This may influence the site performance, e.g., opening pages might take longer. We recommend using a personal system setting to have the least possible impact upon other users. You can tell that the application is working in the debug mode by the indicator on the application main menu.

Debug mode indicator on the application main menu

bpm’online

7.13.0.115 Debug



General

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